

ONGOING FINANCIAL PLANNING

BASE MONTHLY FEE

Dentist \$300 Student/Resident \$50



ADD COMPLEXITY ADJUSTMENTS

Married + \$100 Practice Owner + \$100



ADD HOUSEHOLD INCOME ADJUSTMENTS

\$0 - \$250,000 + \$0 \$250,001 - \$500,000 + \$75 \$500,001 + + \$150



ADD NET WORTH ADJUSTMENTS

Example Monthly Fees:

 \widehat{W} Married Student, \$50,000 Income, \$0 Net Worth = \$50

 \widehat{W} Single Dentist, Practice Owner, \$300,000 Income, \$200,000 Net Worth = \$475

 \square Single Dentist, \$200,000 Income, \$750,000 Net Worth = \$400

 \widehat{W} Single Dentist, Practice Owner, \$350,000 Income, \$800,000 Net Worth = \$575

 \widehat{W} Married Dentist, Practice Owner, \$550,000 Income, \$1,500,000 Net Worth = \$850